

# Daniel Lazo

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## EXPERIENCE

### **CARRIER** | DATA ANALYTICS SPECIALIST

Jan 2022 – Present | Palm Beach Gardens, FL

- Evaluate control design and effectiveness and identify any internal control weaknesses.
- Leverage Microsoft Power BI for custom-made Analytics reports on an audit by audit basis.
- Present audit conclusions and recommendations to management through clear, concise audit reports.
- Assess risk of key business processes resulting in the preparation of audit plans and specific audit programs.
- Create process maps of significant financial, business, and operational processes in order to recommend opportunities for improvement.

### **CARRIER** | INTERNAL AUDIT SPECIALIST

Jan 2020 – Dec 2021 | Palm Beach Gardens, FL

- Evaluate control design and effectiveness and identify any internal control weaknesses.
- Leverage Microsoft Power BI for custom-made Analytics reports on an audit by audit basis.
- Present audit conclusions and recommendations to management through clear, concise audit reports.
- Assess risk of key business processes resulting in the preparation of audit plans and specific audit programs.
- Create process maps of significant financial, business, and operational processes in order to recommend opportunities for improvement.

### **CARRIER** | FINANCE ANALYST, PMO FINANCE

Aug 2019 – Dec 2019 | Palm Beach Gardens, FL

- Produced the Hyperion Financial Management (HFM) load file utilized by WHQ FP&A to track spin-off costs across all global functions.
- Assisted Carrier PMO Finance lead with tracking and analyzing spin-off costs across all departments, in preparation to spinning off from UTC.
- Implemented a CAPEX tracking report for global disentanglements and other significant spin-off projects, providing a granular level of analysis by tracking costs across three ERP systems.

### **UNITED TECHNOLOGIES** | FINANCIAL LEADERSHIP PROGRAM (FLP)

Jul 2017 – Aug 2019 | Various Locations

### **TOSHIBA-CARRIER JV** | FLP ASSOCIATE, FP&A

Feb 2019 – Aug 2019 | Plymouth, United Kingdom

- Calculated sales-rep commissions for monthly tracking and quarter-end incentives.
- Consolidated Toshiba-Carrier month-end actuals, and provided forecast analysis presented at EMEA calls.
- Identified risks and opportunities through the reporting of daily sales for Toshiba-Carrier and CIAT UK by running queries on Oracle, Hyperion Financial Management, AS400, and SAGE.

### **CARRIER HVAC AMERICAS** | FLP ASSOCIATE, FP&A

Aug 2018 – Feb 2019 | Charlotte, NC

- Assisted the CFO and FP&A Manager in creating financial materials in support of key management presentations including Forecast Call, ELT, Plan review, and internal communication meetings.
- Assisted in the development, preparation, and consolidation of monthly financial forecast and annual plans, evaluating actual results for reasonableness and preparing fluctuation analysis on balances as necessary.
- Prepared and distributed daily sales, margin, weekly bookings and backlog reporting to HQ Americas and CML management to support management's ability to track sales force productivity in relation to the financial plan/forecast.

### **PRATT & WHITNEY PSD** | FLP ASSOCIATE, FINANCIAL OPERATIONS

Feb 2018 – Aug 2018 | Springdale, AR

- Booked end-of-month journal entries to reflect inventory in-transit and required reserves, confirming month-end balances with vendors.
- Analyzed operating expenses, labor hour, and productivity metrics, providing process improvement solutions to act on key findings regarding efficiency and cost per hour.
- Completed daily invoicing process, charging customers for services provided and paying suppliers for services received, and successfully invoicing millions of dollars for parts shipped on Day -1 to ensure proper revenue recognition.

## **UTC AEROSPACE SYSTEMS | FLP ASSOCIATE, SCM FINANCE**

Aug 2017 – Feb 2018 | Windsor Locks, CT

- Reconciled accounts to G/L transactions by providing necessary documentation on ARMS.
- Kept daily track of receipts corresponding to purchase orders, and created a standardized process to better reflect constant changes.
- Reported on Purchase Price Variance (PPV) by analyzing data extracted from SAP and determining key drivers for Standard Cost deviations.
- Booked month-end journal entries to accurately reflect balance with external entities doing business with the company, communicating with customers as needed.
- Owned the annual Standard Cost setting process for 2018, communicating with internal clients and pushing for timely submissions of standard cost calculations by set deadlines.

## **UTC AEROSPACE SYSTEMS | INTERN, QUALITY ASSURANCE**

Feb 2016 – May 2017 | Miramar, FL

- Created an interactive .xlsx file, with Excel VBA, to keep track of parts turned back after failing final Quality inspections.
- Improved the COPQ tracking report by incorporating a log of cost variances for each part, allowing management to track more effectively updates done on SAP.
- Kept track and accurately reported on Quality metric updates for COPQ, WIP, and Turnback Yield on a daily basis to management and Business Unit Leaders (BULs).
- Audited Quality Technical Publications on a bi-monthly basis to ensure current and accurate information was being dispersed to engineers and shop-floor technicians.
- Updated the interface and functionality of the Miramar Portal, an interactive .xlsx file accessed by engineers on a daily basis to pull relevant technical publications and work procedures.

## **STATE FARM | SALES ASSOCIATE, LIFE & HEALTH INSURANCE**

Feb 2016 – May 2017 | Miramar, FL

- Reviewed quality and compliance of FEMA letters sent to the agency.
- Educated prospects on life insurance and other services offered by the company.
- Developed and implemented social media and overall sales strategies to boost prospect creation, resulting in leading financial literacy workshops at Florida International University, among other projects involving college students.

## **EDUCATION**

### **FLORIDA INTERNATIONAL UNIVERSITY (FIU), THE HONORS COLLEGE**

BACHELOR OF ARTS IN BUSINESS ADMINISTRATION, R. KIRK LONDON SCHOOL OF BUSINESS

Dual Degree in Finance & International Business

December 2016 | Miami, FL

### **MIAMI DADE COLLEGE (MDC), THE HONORS COLLEGE**

ASSOCIATES DEGREE, INTERAMERICAN DUAL LANGUAGE PROGRAM

Business Administration

May 2013 | Miami, FL

## **SOCIETIES & VOLUNTEER WORK**

### **CARRIER FINANCIAL LEADERSHIP PROGRAM (FLP) | MEMBER, ACTION COMMITTEE**

Dec 2020 – Present | Palm Beach Gardens, FL

### **CARRIER CHEER | CO-CHAIR, PROFESSIONAL DEVELOPMENT COMMITTEE**

Sep 2020 – Present | Palm Beach Gardens, FL

### **APPRENTICE WORLDWIDE | CO-CHAIR, FINANCE & ACCOUNTING COMMITTEE**

Sep 2016 – Present | Miami, FL

### **ALPHA KAPPA PSI | PRESIDENT & TREASURER, XI-SIGMA CHAPTER**

Aug 2015 – Dec 2016 | Miami, FL

## **SKILLS**

### **TECHNICAL**

Microsoft Excel • Microsoft Power BI • PowerPoint • SAP • Oracle HFM • Python

## **LANGUAGES**

Spanish: Native • Portuguese: Intermediate reading